



CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

Scholar in Residence

Summary:

Position exists to provide a learning experience within the CFP Board organization as an investment in the financial planning profession's future. Experiences will include assignments throughout most departments, which will include substantive projects including, but not limited to identifying and conducting relevant research initiatives to promote the financial planning profession. Additionally, the position will serve as a staff subject matter expert (SME) to ensure the most recent knowledge and research findings are incorporated into the CFP® certification process.

Major Responsibilities:

1. Collaborate with CFP Board staff in advancing CFP Board's mission. Gain exposure to Education, Examinations, Professional Standards, Public Policy, Communications and Marketing departments.
2. Work with departments to identify and recommend research topics, writings, and/or articles to support and enhance certification in the profession.
3. Working in a collaborative role, utilize expertise to provide input on strategic and operational direction, goals and objectives for departments, as well as CFP Board's mission.
4. Participate in and support meetings, conference calls and webinars, as needed. Assist with agenda development, reference materials, and participate in discussions with volunteers.
5. Conduct various types of research as needed
6. Communicate ideas, both orally and in writing, to a diverse group of stakeholders. .
7. Recognize the organization's core values, ethical standards, strategic initiatives and mission to ensure effective delivery of results.
8. Respond to inquiries from employees, volunteers, or CFP® professionals as needed.
9. Opportunity to blend personal doctoral research and focus with the mission of CFP Board.
10. Other duties as assigned.

Reports To: Managing Director Education, Examinations & Talent

Supervises: N/A

Position Requirements:

- Recent Doctorate, ABD or doctoral candidate in personal financial planning or related discipline
- Personal financial planning subject matter expertise, acquired through coursework, teaching in CFP Board-Registered Programs, and/or professional experience



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- Demonstrated interest in the recognition and advancement of the personal financial planning profession and CFP® professional certification
- A good understanding of the financial services industry
- Demonstrated ability to problem solve and apply knowledge and skills in a variety of different settings with a diverse group of stakeholders
- Appreciation for CFP Board's mission and the role of financial planning benefits for the public
- Ability to meet deadlines and project timelines
- Ability to work within and ensure adherence to established guidelines and procedures
- Demonstrated success with research and writing, both for academic publication and trade journals
- Interpersonal skills to handle sensitive and confidential situations with tact and diplomacy
- Demonstrated ability to work and collaborate with other members of a team in a business office environment with a results-driven culture
- Proven record as an independent performer to achieve results with minimal supervision
- Proficient in Microsoft Office and on-line research tools

Position Term:

- This is a full-time, paid, benefits-eligible staff position with a one-year term appointment, subject to annual renewal option. Partial housing and relocation benefits eligibility.

Date: June 2011

Please submit cover letter and curriculum vitae to HumanResources@CFPBoard.org